



MIDEX

Concept Study & Downselect

Carlos Liceaga
Explorer Acquisition Manager
NASA Langley Research Center

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Major Changes in the MIDEX CSR Guideline

- Each paper copy of the CSR must include a CD with the CSR in a single file to facilitate searching (the PDF format is preferred).
- All usage of the DSN and non-DSN facilities, including the TDRSS, must be explicitly described and costed as separate line items.
- Subcontracting Plans
 - Phase A funds can no longer be used to develop subcontracting plans.
 - Reimbursement for subcontracting plans can only be as an indirect, so-called bid and proposal, cost.
- Updated Figure 3 in Cost Plan Section.
- Expanded description of the following CSR Appendices
 - Letters of Endorsement
 - Relevant Experience and Past Performance
 - Orbital Debris Analysis
 - Technical Content of Any International Agreements

Major Changes in the MIDEX CSR E/PO Guidelines in Appendix B

- The general criteria were revised in August 2001 after the release of the AO.
- The Explanatory Guide to the Office of Space Science Education and Public Outreach Evaluation Criteria was revised in February 2002.
- Two more regional E/PO Broker/Facilitators.
- New website address.
- Updated the three budget summary template tables.
- New point of contact for questions.

MIDEX CSR Guideline Overview

- All program constraints, guidelines, definitions, and requirements in the AO are still valid unless noted.
- The CSR is to be a self-contained document.
 - Do not assume that evaluators have read or have access to the original proposal.
- Launch Services
 - Those proposing launches where there is known risk of launch delays beyond the project's control (e.g. Space Shuttle launch, shared ELV launch) must address how they will manage that risk within the proposed cost and schedule.
 - If the proposed launch opportunity is a secondary or co-manifested payload on an ELV, the proposer must identify the opportunity and provide evidence that the launch service provider agrees to manifest the investigation.

MIDEX CSR Guideline Overview

- Freedom of Choice for Space Operations
 - Proposers are free to use services from sources other than NASA Space Communication and Data Service (SCDS – formerly Space Operations Management Office/SOMO).
 - SCDS services include communications, tracking mission operations, flight dynamics, and data processing.
 - Costs for these services whether provided by SCDS or other sources must be included in cost estimate.
 - Project must conduct trade studies on use of SCDS versus any alternative.
 - Trade study may be in Phase A or no later than Phase B
 - Must use SCDS services if they meet mission objectives at a life-cycle cost to the project or to the OSS that is less than or equal to any proposed alternatives.
 - If OSS and SCDS agree that the proposed approach does not result in the lowest life cycle cost, OSS may direct the Explorer project to modify its approach.
 - See “NASA’s Mission Operations and Communications Services” in the MIDEX Library
 - See Q&A presentation at this meeting

MIDEX CSR Guideline Overview

- In Phase 1, Science was prioritized; in Phase 2 implementation details and commitments will be emphasized. Definitized, final planning will be expected in the Report.
- If Project is chosen at Downselection, the proposed costs submitted with the Concept Study Report are final unless NASA elects to renegotiate them during the Project Kickoff.
- No cost growth after selection is allowed, therefore, best possible cost estimates with margins should be proposed.
- For government provided services (launch services, Mission ops, comm., etc) get latest revised estimates and letters of commitment. Contact POC's in reference documents.
- Full cost accounting.
- If obligation authority in excess of identified costs is required, indicate the authority needed by year.
- Detailed cost proposal with cost or pricing data as defined in FAR 15.401 is required for Phase B through E.

MIDEX CSR Guideline Overview

- *Guidelines and Criteria for the Concept Study Report*, defines the preparation and submission requirements.
- Reports are single volumes to be organized as outlined in the Guidelines document.
- Page formats and limitations are defined: note foldout = 1 page, no more than 7 foldout pages.
- No reference to proposals; evaluation only of material from (1) Concept Study Report; and (2) Briefing materials from Site Visits.
- Letters of endorsement must be provided from all organizations participating in and critical to the investigation. This includes contributions and all E/PO partners. See Part II Section M 1 of the CSR.
- Technical Approach and Management plan must be finalized. A draft Mission Definition and Requirements Agreement (MDRA) is a required Appendix. See Part II Section M 5.
- Definitized planning for E/PO, New Technology, and SDB.
- Appendices other than specified are NOT allowed.

MIDEX CSR Guideline Overview

- Technical, Management, Cost and Other (TMCO) factors
 - TMCO evaluation defined in *Guidelines and Criteria for Concept Study Report* document in MIDEX library <http://explorer.larc.nasa.gov/explorer/mel.html>
 - In Phase 1, TMC Risk was evaluated in only 3 degrees each: Low Risk, Medium Risk, High Risk.
 - In Phase 2/Downselect, we expect 9 degrees for TMCO will be used for evaluation.
 - Cost Realism will be an important risk consideration.
 - Proposals at or near the cost caps and/or with insufficient cost margins will likely be considered High Risk.
 - New technology will add risk unless flight qualified (TRL 8) or have flight qualified/demonstrated backups.
 - All pertinent criteria for Other factors (E/PO, SDB, and New Technology) must be addressed.

MIDEX CSR Guideline Overview

- Oral Briefings/Site Visits
 - Oral briefings/site visits to be scheduled in the period of approximately 1/13/03 - 2/7/03.
 - Location of the Briefings/Sites to be determined by the PI/proposal team and coordinated with LaRC/Carlos Liceaga.
 - Briefing at each site will be limited to 8 hours; an additional 1 hour for a site tour is allowed. (Suggest days of 8-6:30 including breaks, lunch, and evaluation team mid-day caucus.)
 - Visiting evaluation team will be constrained, therefore all briefings should be in plenary. (Avoid splinters please.)
 - Written mission specific questions will be submitted to the PI/proposal team about 3 working days before visit regardless of order or schedule date. All teams will get the same lead time.
 - Unless specifically requested by NASA otherwise, only data and material presented or provided during the visit will be considered.
 - Preferred Site selections and dates are due to LaRC nlt TBD.
 - Confirmation of Site Visit Schedule will be given nlt TBD.